# AIM Technologies

# DataSpy™

**For Microsoft Dynamics™**

**Microsoft Dynamics™ GP Professional**
**Microsoft Dynamics™ GP Standard**
**Microsoft Small Business Financials**

# Installation, Setup and User Manual

Version 9.0

# DataSpy™

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# Product Overview

**DataSpy**™ is a powerful tool that can help eliminate the difficulty and frustration of tracking data through the system, saving you valuable time and reducing expenses associated with development of reports and customizations within Microsoft Dynamics GP and third-party modules.

Through a single window, users can view all of the database information necessary to develop reports and customizations. DataSpy gives you all of the pertinent information on the data flowing through the system, showing which tables are updated, added to, or deleted from as you step though transactions.

**DataSpy Allows You To:**

❖ View the technical, physical, and display names of tables;

❖ Customize the results returned to suit your needs;

❖ View the results of transactions, including which tables are affected;

❖ Create reports easily by viewing detailed information about tables and fields containing the data you are reporting.

DataSpy™

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# Technical Support

AIM Technologies Technical Support is available Monday through Friday from 9:00 am to 5:00 pm Central time.

Technical Support can be reached via any of the following methods:

**985-951-7580 (voice)**
**253-295-0740 (fax)**
**Support@AIM-Technologies.com**
**http://www.AIM-Technologies.com/suprequest.htm**

Please include the following information with any support request:

➢ Your company name and phone number.

➢ Your name

➢ The name of the product you are working with (Microsoft Dynamics GP Professional, Microsoft Dynamics GP Standard or Small Business Financials)

➢ The version of DataSpy you are running (from the registration window).

➢ A brief description of the problem.

# Installation

The installation of DataSpy requires the following steps:

## 1. **Install DataSpy Code**

❖ Unzip the **DS90b??.zip** file that was downloaded from our web site, double click the **Setup.exe** file to run the setup routine.

❖ The DataSpy 9.0 - InstallShield Wizard window opens.
  ➢ Click **Next** >.

❖ Review the Software License Agreement, and confirm or deny your acceptance of the terms described within.
  ➢ If desired, you can click the **Print** button to print a copy of the Software License Agreement for your records.
  ➢ **If you agree**, select "I accept the terms of the license agreement" and click **Next** to continue.
  ➢ **If you disagree**, select "I do not accept the terms of the license agreement" and click **Cancel** to exit the installation wizard.

❖ Specify the folder where the Microsoft Dynamics GP / SBF application is installed. This folder is typically located on your local hard drive.
  *Important: The installation routine will default the installation to a directory on the workstation. If this is not the location where Microsoft Dynamics GP / SBF is installed on your machine, you will need to specify the correct directory.*

❖ Verify that it is the correct directory, or use the **Change** button to select the location of the desired version of Microsoft Dynamics GP / SBF.
  ➢ After confirming the installation path, click **Next** >.

❖ The Ready to Install window opens.
  ➢ Click Install to copy all files to the appropriate directories.

❖ The InstallShield Wizard Completed window opens when installation is done.
  ➢ Click Finish.

## 2. Include the new code

**After the DataSpy files have been copied to your system, Microsoft Dynamics GP or SBF must then "include" the code.**

- **For Small Business Financials**:  After launching SBF, the code will be included automatically.

- **For Microsoft Dynamics GP**:  After launching Microsoft Dynamics GP, you will see a prompt asking if you want to include new code, similar to the following illustration.
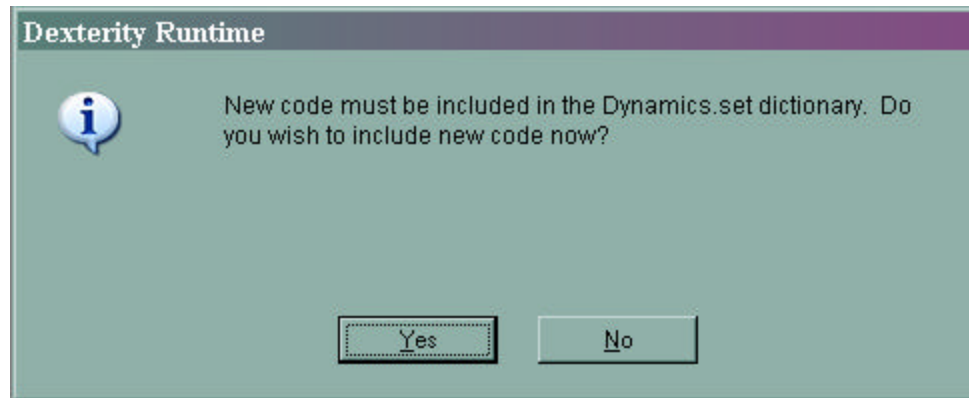


Click **Yes** and allow the code to be included.

A progress bar will display, while the "unchunking" process is executing.

This installation step performs the following tasks:

➢ The DYNAMICS.SET file is modified to include the information required to run DataSpy.

➢ A dictionary named "DATASPY.DIC" is created in your Microsoft Dynamics GP / SBF application folder.

Perform steps 1 and 2 from above for every workstation on which you desire to run DataSpy.

Installation of DataSpy is now complete and you are ready to begin the Setup process.
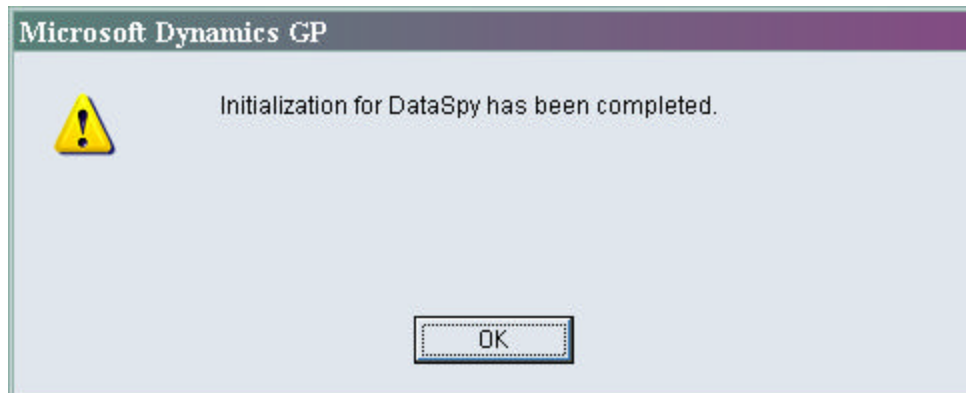
# Setup

The procedures to setup and activate DataSpy for your company are as follows:

1. **Login as System Administrator**
   a) Login to the system as a system administrator (sa or DYNSA).
   b) Select the company in which you want to setup DataSpy.
   c) You will receive a prompt similar to the following if DataSpy has not yet been initialized. Select the Yes option to create the tables and stored procedures for DataSpy.
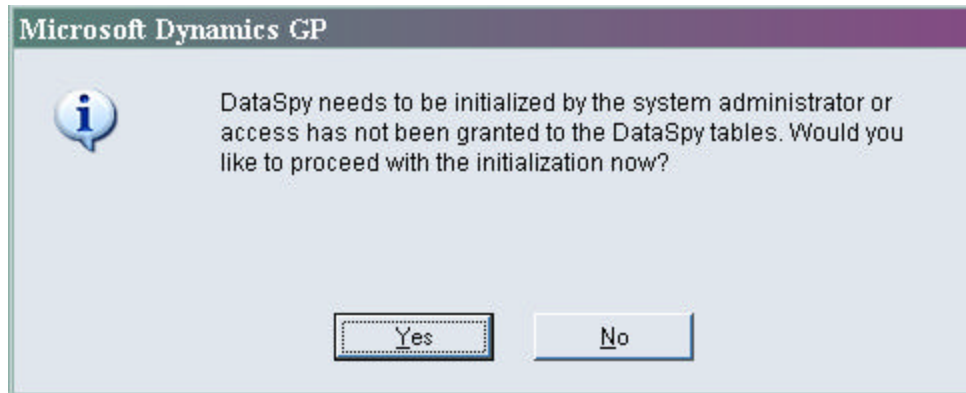


   d) Upon completion, you will receive a prompt similar to the following. Click OK to close the window.



2. **Run Grant.sql**
   For Microsoft Dynamics GP SQL installations, run Grant.sql against the DYNAMICS database. (For SBF no additional setup steps are required.)
   a) Open the SQL Query Analyzer.
   b) Locate and open Grant.sql in the \sql\util folder under the folder in which Microsoft Dynamics GP is installed.
   c) Run Grant.sql against the DYNAMICS database.

3. **Add Shortcuts for DataSpy Windows**
   b) Login to the system as a system administrator (sa or DYNSA).
   c) Select the company in which you want to setup DataSpy.
   d) Add the following windows to your shortcuts (On the Shortcuts bar, Add>Other Window>DataSpy>3rd Party)
      - DataSpy Registration
      - DataSpy Setup
      - DataSpy
   e) Click Done after adding all of the windows listed above.

3. **Enter Registration Keys**
   a) Click on the Shortcut you created above for DataSpy Registration.
   b) Enter the registered company name and keys as provided to you.
   c) Click OK to save the registration information and close the window.

# Begin Using DataSpy

## 1. Create or Modify DataSpy Setup Information

a) Click on the Shortcut you created above for DataSpy Setup.
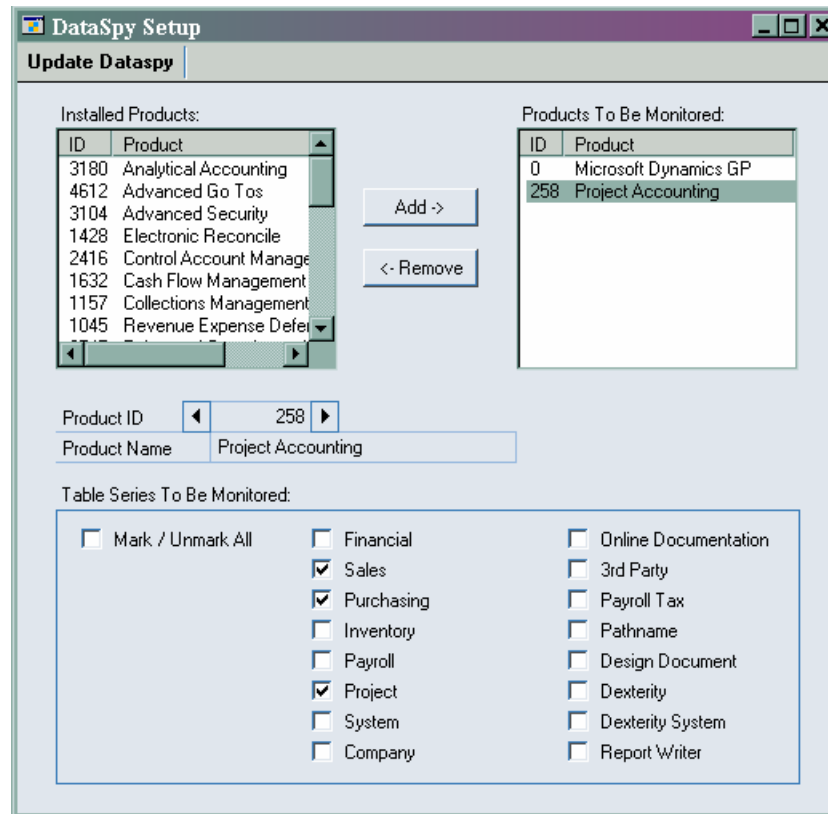


b) Select one or more of the Installed Products to be monitored by selecting the product in the Installed Products window and clicking the Add button to insert the product into the Products To Be Monitored window. Repeat this step for every product that you want to monitor.

c) Click on the first product in the Products To Be Monitored window and mark each of the appropriate series of tables you want to monitor in the Table Series To Be Monitored window. Repeat this step for every product listed in the Products To Be Monitored window.

d) Click the Update DataSpy button to allow the system to register all of the appropriate products and series to be monitored..

## 2. Open DataSpy

a) Click on the Shortcut you created above for DataSpy. The following window will open.
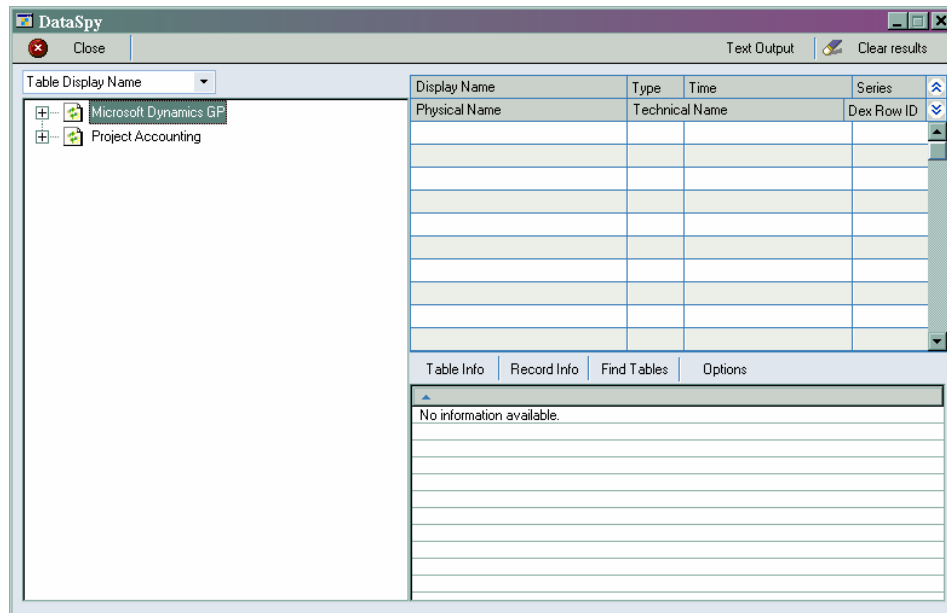


b) Several options are available to be selected, including the following:
   - The table names displayed can be either the **Table Display Name**, **Table Technical Name** or **Table Physical Name**
   - For each table listed in the display window, you can select to view either the **Table Info** or specific **Record Info**, by clicking the appropriate button.
   - You can select whether to include the Dex Row ID field in the output data from the **Options** button.

# 3. Process Transactions to be Monitored

a) You can now begin monitoring any processes within the Dynamics GP system that have been included in the products and series selected in section 4 above. As an example, after entering and saving a Purchase Order, the following data might be displayed, providing the names of all tables that had records added, updated or deleted; and additional detailed information for the record(s) processed:



b) After completing the desired process, you can export the results to a text file by selecting the **Text Output** button.

c) The **Clear Results** button will remove all of the output from the DataSpy window, making it ready to monitor a new transaction or process.